



RESORT TAX

— BUILDING BIG SKY SINCE 1992 —

→ MISSION ←

*“Fairly collect tax for strategic investments to ensure
the well-being of the Big Sky Community.”*

Big Sky Resort Area District Strategic Plan

FY21 – FY23

www.ResortTax.org

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Big Sky Resort Area District (District) – Who We Are

Vision Statement

*“Big Sky is **BETTER TOGETHER** as a result of wise investments, an engaged community, and the pursuit of excellence.”*

EXECUTIVE SUMMARY

Since 1992, the District has collected a 3% tax on the sales of “luxury” goods and services. Since its inception, over \$70 million in investments have played a significant role in funding priority programs and projects throughout Big Sky. Included in these investments are infrastructure facilities, post office services, ambulance and emergency services, public transportation systems, parks and trails, community library, tourism development, public health, safety, and welfare services.

As an unincorporated community, these dollars have been a pivotal tool for funding Big Sky’s priorities. Our community grows and thrives, and the District must adapt to ensure we meet the demands. The community guided *Our Big Sky Vision and Strategy* plan, serves as an overarching framework for ensuring Big Sky executes its vision. The plan outlines a community vision built on the following cornerstones:

PEOPLE: *A community of welcoming, like-minded people – families and friends, faces new and old, that seek personal connections and to help one another.*

CHARACTER: *A community driven by its shared values that offers a high quality of life, access to opportunity, sustainable economic prosperity, stewardship, and a sense of place to all.*

RECREATION: *A community of outdoor enthusiasts comprised of individuals who are here for the opportunity to live, work, and play within minutes of their doorstep.*

NATURAL ENVIRONMENT: *A community nestled in the center of pristine National Forest and abundant wildlife that is actively working to grow, while advocating for preservation of its surrounding ecosystem.*

To ensure the success of the community vision, the District believes the following mission, values, and goals will guide our strategic work. The following **Pillars** and **Goals** (see Appendix A) will further assist in our effort:

I. CULTURE OF EXCELLENCE

*Cultivate Ongoing Development
Nurture Organizational Unity
Proactively Plan and Adapt*

II. ENGAGE OUR COMMUNITY

*Foster Public Engagement
Create Community Awareness*

III. STRATEGIC INVESTMENTS

*Invest in Identified Community Needs
Foster Strategic Collaborations
Require Accountability*

Mission Statement

MISSION: “Fairly collect tax for strategic investments to ensure the well-being of the Big Sky Community.”

The District will continually embody a spirit of “double loop learning” using the identified **Core Values** in how work is completed internally and externally.

Accountability: We keep our word, follow through with commitments, and hold partners to the same standard.

Collaboration: We seek partnership in all endeavors and believe it results in the best possible outcomes.

Stewardship: We lead by example, taking care of Big Sky’s people, economy, and natural environment.

Engagement: We recognize the power civic engagement plays in a healthy community.

Inclusion: We strive to create opportunities for community involvement for all who reside in Big Sky.

The District has high standards for representatives expecting them to embrace the following **Principles of Operation** when engaging on behalf of the organization.

Fairness: We speak honestly, directly, and kindly within and about our community.

Thorough: We are detail oriented and evaluate all perspectives.

Legal: We operate only within the constraints of the law.

Proactive: We are forward thinking and will lead and follow as necessary.

Responsible: We operate strategically in order to maximize the resources within our community.

“In the future, Big Sky will be built out, but in a way that preserves the natural beauty of this place and is sustainable, ensuring it will be here for generations to come.”

~ Our Big Sky Strategy and Vision

The District invites you to join us in making your vision a reality,



A handwritten signature in black ink, appearing to read 'D. Bierschwale', with a long horizontal line extending to the right.

Daniel Bierschwale, District Manager

Appendix A – Strategic Pillar Action Plan: I. CULTURE OF EXCELLENCE

The District will become a cornerstone of the community by institutionalizing a culture of excellence and leadership. An organizational spirit of unity will be fostered ensuring the board is focused at a strategic level and staff operationally execute the day-to-day. Ongoing evaluation of community impact will ensure the District adapts to meet Big Sky’s needs. Embodying a culture of excellence will require a spirit of collaboration and fairness. Thorough forecasting and planning will ensure the District has the foundation for fiscal responsibility of Resort Tax funds.

Strategic Goal: A. CULTIVATE ONGOING DEVELOPMENT

OUTCOMES:				
- Teamwork	- Physical Health	- Mentoring	- Efficiency and Effectiveness	- Work Life Balance
- Metric Based goals	- Team Satisfaction	- Consistency	- Community Leadership	- Retention
Tasks/Projects	Outputs & Deliverables	Project Team (Staff/Board/Partners)		
1. Staff Development	Continuing Education Plan Work Plans Annual Operating Plans	Staff, Contractors, Subcommittee		
2. Establish Clear Roles & Duties	Job Descriptions (Board & Staff) Succession Plan (Board & Staff) Training Calendar	Board, Staff		
3. Use Technology to Advance Organization	Design Software Project Management Software Communication Software Board Software/Portal	Board, Staff, IT Contractor, Legal		
4. State-Wide Leadership	Resort Tax Association Lobbying Calendar Monitor State Tax Legislation	Staff, Resort Tax Communities, Lobbyists, Legal		

Appendix A – Strategic Pillar Action Plan: *I. CULTURE OF EXCELLENCE*

Strategic Goal: B. NURTURE ORGANIZATIONAL UNITY

OUTCOMES				
- Retention	- Authentic Relationships	- Efficiency	- A sense of Pride	- Clarity
- Effective Communication	- Fewer & More Effective Meetings	- Humor and Fun	- Shared Vision and Goals	
Tasks/Projects	Outputs & Deliverables	Project Team (Staff/Board/Partners)		
1. Establish Standards	SOPs Policy Manual Training Calendar HBDI Training Sessions	Board, Staff, Contractors, Legal		
2. Proactive Scheduling and Planning	Work Plans Review and Adapt BSRAD Strategic Plan Board Recruitment Strategy	Staff, Board		
3. Standardized Orientations	Revise/Review Orientation Manual	Board, Staff		
4. Encourage On-going Board Relationships	1:1 Board Member Check-Ins Board Chair QTRLY 1:1 Check-ins	Board, Staff		
5. Establish Meeting Standards	Pre-drafted Motions Board Packet Overview w/ staff Recommendations Outline purpose of Each Item in Board Packet Board Packet Updates	Board, Staff, Legal		

Appendix A – Strategic Pillar Action Plan: *I. CULTURE OF EXCELLENCE*

Strategic Goal: C. PROACTIVELY PLAN AND ADAPT

OUTCOMES		
- Smoother Transition - Flexibility	- Fewer But More Productive Meetings - More Efficient	- Effective Project Management - Long-Term Forecasting
		- Fiscal Responsibility - Accurate Budgets
Tasks/Projects	Outputs & Deliverables	Project Team (Staff/Board/Partners)
1. Establish 3-Year Operating Calendar	Operating Calendar Appropriations Calendar Integrate Appropriation Cycles 3-Year Budget Annual Work Plans	Board, Staff, CPA
2. Review and Adapt Operating Plan	Operating Plan Progress Report	Board, Staff
3. Resource Tracking	Gantt Charts Resource Gap Analysis	Staff, Contractors
4. Resource Planning	Long-Term Staffing Plan Review Contractor Needs/Performance Shared Resources	Staff, Board, Partners (Resource Sharing)

Appendix A – Strategic Pillar Action Plan: II. ENGAGE OUR COMMUNITY

The District will become a community leader, exhibiting ongoing community-wide collaboration and encouraging diverse public participation. An authentic and genuine approach towards creating a “sense of community” will not only inform District decisions but also enhance transparency ensuring accurate public perception. Embracing proactive communication strategies will strengthen public understanding thus dispelling misinformation. Our long-term approach towards engagement will increase public interest in the District and subsequently serving on the Board, Staff, and Volunteer Committees.

Strategic Goal: A. FOSTER PUBLIC ENGAGEMENT

OUTCOMES:			
-Engaged Collectors & Fund Recipients	- Positive Public Opinion	- Authentic Relationships	-Increase Community Involvement
-Prevalent Community Presence	- More Volunteers	- Increased Voter Turnout	-Spirit of Partnership - Transparency
Tasks/Projects	Outputs & Deliverables	Project Team (Staff/Board/Partners)	
1. Engage Collectors	Business Advisory Group New Business Welcome Packet Business Orientations Collector Surveys Compliance Process	Collectors, Chamber, Staff	
2. Create Community Presence	Engagement Calendar Attend Existing Community Events Outreach Events Tent and Booth Attend Community Meetings	Staff	
3. Understand Local Perception and Demographics	Support Census Survey Community (ITRR)	State, Staff	
4. Facilitate Gov 2 Gov Collaboration	Asks at Joint-County Commission Encourage Voter Turnout Local District Meeting Calendar	Local Districts, County, Staff	

Appendix A – Strategic Pillar Action Plan: II. ENGAGE OUR COMMUNITY

Strategic Goal: B. CREATE COMMUNITY AWARENESS

OUTCOMES:		
- Informed Community -Prevalent Community Presence - Increased Voter Turnout -Transparency - More Revenue -Preventing Misinformation -Increase Compliance -Positive Public Perception -Resort Tax Advocates		
Tasks/Projects	Outputs & Deliverables	Project Team (Staff/Board/Partners)
1. Resort Tax Education	Eggs and Issues Topics Printed Materials Update Website (Funding/Collections)	Staff, Contractor (Web/Design), Chamber
2. Employ Strategic Communications	Collector Newsletter Fund Recipient Newsletter One-Sheets (Popup Vendor, STR, Accountant) Annual Report Videos Communication Calendar	Press, Staff, Contractor (Video/Design)
3. Develop Key Messages and Shift Community Narrative	Rebranding (Logo, Style Guide, Value Prop, Tagline) Infographics and Key Statistics Shared Lexicon	Staff, Board
4. 1% Comm Plan	1% Partner Message Calendar 1% Press Release & FAQ	W&S District, Press, Staff
5. Leverage Local Media	Recurring Article (Did you Know) In the Press (BSRAD Website)	Press, Staff, Fund Recipients, Collectors

Appendix A – Strategic Pillar Action Plan: III. STRATEGIC INVESTMENTS

The District will demonstrate leadership, ensuring the future well-being of Big Sky through strategically investing funds. Stewarding a spirit of community collaboration and accountability will measure the impact of fund investments. Partnerships will support appropriate investment in community needs and execute the Big Sky Strategic Plan. The community’s needs are great and therefore we must leverage all available funding sources. It is our responsibility to maximize Resort Tax for long-term impact for future generations.

Strategic Goal: A. FOSTER STRATEGIC COLLABORATIONS

OUTCOMES:		
- Collaborative Planning - Philanthropic Alignment - Minimized Applicant Competition - Organizational Independence - Increased Funding Matches - More Impact of Funds - Awareness of Funding Gaps - Fiscal Responsibility -Transparency		
Tasks/Projects	Outputs & Deliverables	Project Team (Staff/Board/Partners)
1. Strengthen Relationships with Public Fund Community	Coordinating Council Participation Host Commission/BSRAD Meetings Coordinated Funding Plan (Gallatin and Madison Counties)	Partners, Staff, CCBS, Counties, Subcommittee
2. Strengthen Relationships with Philanthropy Community	Coordinating Council Participation Annual Funding Summit Coordinated Funding Plan (Philanthropy)	Staff, Partners (Philanthropy), Subcommittee
3. Ongoing Funding Education in Big Sky	BSRAD Annual Report Tax Education Strategy	Staff, Partners, Contactors (Design)
4. Encourage Matching Funds	Application Scoring System Updated Application Funding and Grant Resource Packet	Board, Staff, Subcommittee
5. Encourage Long-Term Planning	Big Sky Board Summit	Partners, Staff
6. Protect Resort Tax	Resort Tax Association Lobbying Calendar Encourage Voter Turnout 3% Renewal Strategy	Staff, Partners, Press, Counties, State
7. Create System for Districts with Mill Levy	Interlocal Agreements Interlocal Applications	Districts, Staff, Board, Counties

Appendix A – Strategic Pillar Action Plan: III. STRATEGIC INVESTMENTS

Strategic Goal: B. REQUIRE ACCOUNTABILITY

OUTCOMES:		
- Predictability - Increased Compliance - Encouraged Long-Term Planning - Measurability - Cash Flow Predictability - Increased Collaboration - Stronger Relationships - Positive Public Perception - Fulfill Community Plan - Financial Stewardship		
Tasks/Projects	Outputs & Deliverables	Project Team (Staff/Board/Partners)
1. Multi-Year Application Revision	Online Funding Application Scoring System Revised Call for Applications Revised Application Summary Applicant Training	Subcommittee, Staff, Applicants, Legal
2. Multi-Year Appropriations Revision	3-Year Fund Implementation Plan Revised Appropriations Ordinance Appropriations Calendar	Subcommittee, Staff, Applicants, Legal
3. Strengthen Collaboration with Applicants	Fund Recipient Audits Applicant Surveys Award Orientations Revised Contracts	Staff, Applicants, Applicants, Legal
4. Develop Standards for Funding Operations	3-Year Operation Forecasts Operations/Capital Analysis	Board, Staff, CPA
5. Revise Progress Report Methodology	Fund Recipient KPI's 1:1 Progress Report Meetings Progress Report Rollups	Staff, Board, Applicants
6. Revise Payment Request Process	Payment Request Report Rollup Digitize Payment Requests in Foundant Payment Request Cash Flow Budget	Staff, Fund Recipients, CPA

Appendix A – Strategic Pillar Action Plan: III. STRATEGIC INVESTMENTS

Strategic Goal: C. INVEST IN IDENTIFIED COMMUNITY NEEDS

OUTCOMES:		
<ul style="list-style-type: none"> - Metrics for Success - Inclusion - Sustainability (Economic and Environmental) - Fairness - More Relevant Requests - Community Dialog - Transparency - Structured Decision Making - Accurate Financial Projections - Partnerships - Planned Bond and Mill Use - Livability in Big Sky - Fiscal Responsibility 		
Tasks/Projects	Outputs & Deliverables	Project Team (Staff/Board/Partners)
1. Utilize Big Sky Strategic Plan	Review and Adapt BSRAD Strategic Plan Develop Scoring Parameters	Board, Staff, Legal, Subcommittee
2. Revise Application	Revised Call for Applications Scoring System Q&A Integration in Foundant	Board, Staff, Legal, IT Contractor
3. Encourage the Coordinating Council of Big Sky	Capital Improvement Plan KPI's for Community Strategies Community Surveys and Report Card Community Strategic Plan Maintenance	Staff, CCBS
4. 3-Year Budgeting	Hire Financial Consultant Investment Strategy & Policy 3-Year Fund Implementation Plan Historical Award Analysis	Staff, Board, CPA
5. Utilize Multi-Year Contracts	3-year Contracts (if \$ available in YR 1)	Staff, Board, Legal
6. Develop Bonding Strategy	Bonding Policy Bonding Application Call for Bond Applicants Revised Bond Ordinance	Board, Staff, Legal
7. Utilize Sinking Fund	Community Capital Improvement Plan Capital Endowment Fund	CCBS, Staff, Board